2018 Questions and Answers
Cal EITC NOFA Education and Outreach

Q: Will this be a multi-year grant?

A: The grants will only be for one year. The term of the agreement is projected to be 10/15/2018 through 6/30/2019.

Q: Can an applicant apply for up to the maximum allocation for a target area if they are applying to an area that has multiple grantees or only the amount of the specified award amount per grantee?

A: An applicant may only apply for the amount found under the "Contract Award" column on chart found on page 12 of the NOFA.

Q: Can you please talk about the web page (Cal EITC specific) ... if there is also information on federal EITC and how to access free tax prep?

A: Collateral materials can be found on CalEITC4ME.org, which contains information on the Cal EITC, federal EITC, and free tax preparation.

Q: When will collateral materials be updated and available?

A: Collateral material from the Franchise Tax Board will be available in December 2018.

Q: If we are applying for more than one region, should we also submit multiple Notice of Intent to Apply (NIA) documents (or just mark off the territories that we would like to go for on one single NIA document)?

A: Only one NIA is necessary. Please indicate on the NIA all the regions for which you intend to apply.

Q: When will the notices of intent to apply be shared on the CSD site so that we can see if anyone else in our area has submitted one?

A: Notice of Intent to Apply will not be posted on the CSD website.

Q: The NOFA for the Cal EITC Outreach grant says that the list of rural counties is listed in Appendix 1 of the NOFA, but I do not see any Appendix to the Outreach NOFA posted on your website. Can you help? We would like a complete list of the counties on the Rural Target Area.

A: Target Area 14-Rural Counties identified in this NOFA are: Alpine, Amador, Butte, Calaveras, Colusa, Del Norte, El Dorado, Glenn, Humboldt, Inyo, Kings, Lake, Lassen, Madera, Mariposa, Mendocino, Modoc, Mono, Nevada, Plumas, San Benito, Sierra, Siskiyou, Sutter, Tehama, Trinity, Tuolumne, and Yuba.

Q: I do not see Monterey County in targeted area. Can Monterey County apply?

A: If a specific county is not expressly identified in Target Areas 1 – 13, then the county will be served through either the Rural Target Area (if the county has 100,000 or fewer people) or Statewide Target Area. The counties in the Target Area were identified because they have the highest proportion of Cal EITC eligible filers. Organizations that apply for the Rural or Statewide grants are

expected to reach the broadest audience as effectively possible.

Q: For statewide efforts - would we have to reach all areas NOT in Areas 1-15? or do we include those as well?
A: Statewide applicants are expected to reach the broadest audience and largest number of eligible Californians as effectively as possible. Statewide grantees are not required to reach all counties outside the Target Areas but may incorporate a focus on those counties into their statewide education and outreach strategy.

Q: For Statewide Applicants - What is the level of information needed in terms of geographic area, for reporting purposes? Up to county? Up to city? Up to zip code?
A: Awarded applicants will need to provide geographic information for the following strategies: canvassing, media, and collateral messaging. The degree of granularity will depend on the specific activity. For instance, a grantee would report door-to-door canvassing at the zip code level, but collateral distribution to a school district would differently.

Q: Seeing that it is not *required*, does adding canvassing to a statewide proposal strengthen it?
A: Although canvassing is not required for statewide or rural grantees, person-to-person interactions by a trusted messenger have been shown to provide the greatest impact. Rural and statewide applicants should consider the feasibility of incorporating this strategy into their application.

Q: Can funds be used to incentivize participation from potentially eligible individuals and partners, for example, to participate in a raffle for answering a survey, or going to a free tax prep site or doing a social media challenge?
A: No, applicants should use non-grant funds to support these types of initiatives. However, applicants are encouraged to engage in innovative strategies that are anchored on the Cal EITC education and outreach activities.

Q: Can we submit letters of support in addition to letters of reference?
A: There is no prohibition from submitting additional documentation. However, it will not be scored or considered by the evaluation team.

Q: May letters of reference be from IRS and FTB contacts, or are letters from community partners preferred?
A: Letters of reference are not scored elements, there is no preference between community partners versus IRS/FTB contacts.

Q: Regarding the application: Is there a sample format for the reference letters?
A: There is not a sample format for reference letters.

Q: Can we include additional attachments with our applications? if yes, is there a limit?
A: The is no prohibition from submitting additional documentation. However, it will not be scored or considered by the evaluation team.

Q: Please clarify the coordination required with the Franchise Tax Board found on NOFA Page 13,

Number 10. Grant Requirements: "Grantees must collaborate with FTB by providing personally identifying data of individuals that were contacted during outreach efforts as well as information related to how these individuals were contacted so FTB can perform the legislatively mandated review of most effective outreach strategies to reach the targeted populations." Can we please get clarification on what is "personally identifying data of individuals" and the process the FTB has in place to collect this (i.e., how do we track individuals through advertising and other types of broad canvassing?)?

A: To facilitate the evaluation of the efficacy of the education and outreach efforts, grantees will be required to provide information of individuals who have received education and outreach to help ascertain the impact it had on their behavior. The methods and process for this effort are yet to be determined. However, this requirement was added to the NOFA to ensure applicants have an awareness that there will be an obligation to participate in these data sharing efforts during the contract term, the scope of which will be determined collaboratively. The sharing of information will be limited to activities where personally identifiable information is already being collected.

Q: What is the indirect cost rate? Beyond rent and staff, what other costs can be included as an indirect cost?

A: Indirect costs rates are predetermined at the organization level and are inclusive of all the support and administrative costs needed to run an organization. Applicants should make every effort possible to minimize overhead/administrative costs and target available funding towards providing direct services.

Q: Can a subcontractor be added after the fact?

A: Yes, subcontractors may be added through the contract process and as its delivery strategies are refined.

Q: You only want the contact *name* for the subcontractor, but no other information?

A: Yes, an organizational name is sufficient.

Q: Will there no longer be a requirement to reach people within designated zip codes?

A: The Organizational Capacity section of the Application Narrative Template (CSD 171ANT) asks applicants to describe how they are targeting, including the zip codes they plan to serve. Competitive applications for Target Areas 1 – 13 should demonstrate how they will serve the zip codes identified as having the highest potentially eligible. This information can be found in Appendix 1 – Maps of Target Areas.

Q: Does messaging have to include all elements specified (i.e. availability of state credit, availability of federal EITC, free tax prep, self-employed, etc.) or can we have messaging targeted to one of the populations depending on our outreach partnerships and medium? For example, social media we focus on self-employed and billboards we focus on young adults for social media.

A: Messaging should be tailored to the audience and format provided. Applicants should tailor messaging to be appropriate for the mode of communication.

Q: If we host an event and have a table and the CalEITC outreach person speaks with people who

visit her table... that counts as canvassing?

A: The scenario provided is considered a group event for the purpose of this NOFA. Canvassing activities are defined for the purpose of this NOFA as those that are targeted one-to-one interactions such as (but not limited to) door-to-door canvassing, text messaging, and phone banking.

Q: In regard to past experience, what if our experience is prior to 2016-2018? For example, if our experience is from 2009, would we be able to list this experience?

A: Applicants must have a minimum of three years' experience conducting similar education and outreach activities and this is to be documented in the Experience Conducing Education and Outreach Activities section of the Application Narrative Template (CSD 171ANT). The experience does not to have to be for the most current, past three years.

Q: Can an applicant specify/include a budget line in their application for data collection or evaluation related costs?

A: No, data collection and evaluation costs are not to be included in the budget. An evaluation of the education and outreach activities will be headed by the FTB.

Q: Are you not requesting any cash or in-kind match this year? It does not seem to be in the forms or NOFA. If asking for matching funds, can the same matching funds used for the CalEITC OE application also be used for the Free Tax Preparation Assistance grant?

A: Due to the size of the grants this year, we removed the requirement for a match to ensure that organizations had equal access to apply.

Q: On the Narrative Template, section for Past Activities Conducting EITC Education and Outreach, p. 5 (of the narrative), the chart breaks activities out into calendar years. Many past activities for contracts with CSD were completed during fiscal years rather than calendar years. Reporting calendar versus fiscal year numbers may result in numbers not directly matching any historical data held by CSD for past contracts if validations are being made. Is it preferred that we total all numbers for January through December or report by contract/fiscal year?

A: Activities reported should be by calendar year to synchronize with the tax filing requirements.